



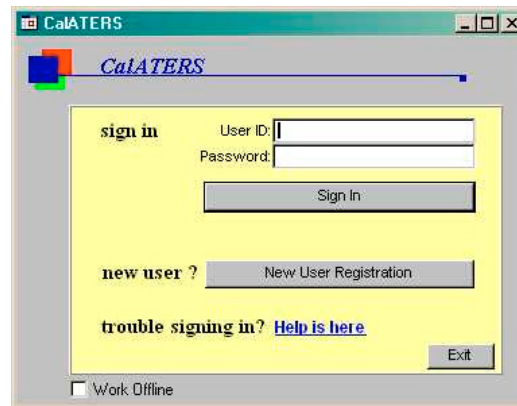
# Approve Travel Advance

**Step 1**



Approvers will receive e-mail indicating that they have a form to approve. From the CalATERS web site at [www.calaters.ca.gov](http://www.calaters.ca.gov), click **CalATERS**.

**Step 2**

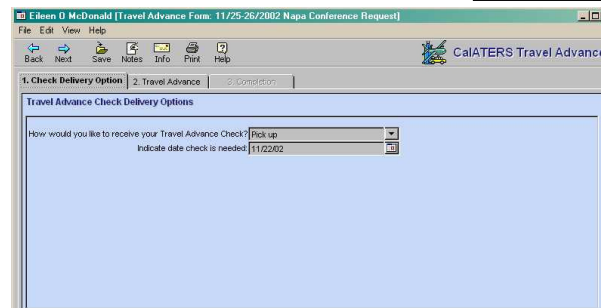


Key User ID and Password.

Click

Sign In

**Step 5**

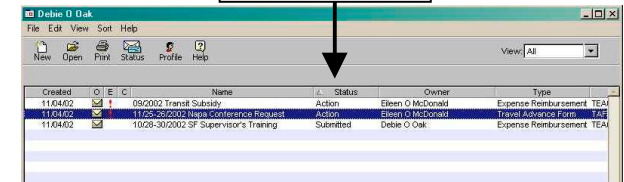


Displays the Travel Advance delivery option and date needed indicated by the employee.

Click tab **2. Travel Advance**.

**Step 3**

Click to sort by **Status**.



From the work queue, open (double click on) a Travel Advance form that has a status of **Action**.

**Step 4**  
Information

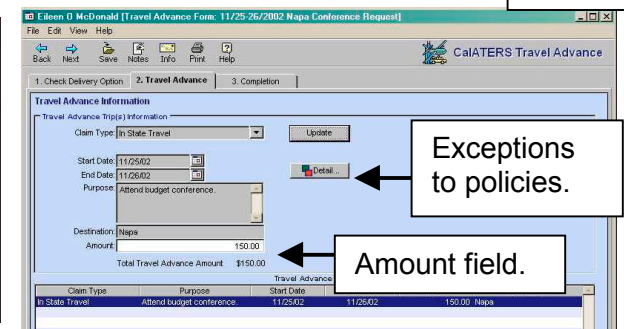


At any point during the review of a Travel Advance form, you may exit and save changes to the form. Click **File, Close**.



Click **Yes** to save changes.

**Step 6**



Exceptions to policies.

Amount field.

Displays requested Travel Advance(s). The **Amount** field can be lowered. The **Detail...** button (bottom right on screen) displays exceptions to department policies.



# Approve Travel Advance

## Step 7 Information

If reducing the amount requested, add a note using the icon.

Key reason in **Comments** and click **Update**, click **Finished**.

Click tab **3. Completion**.

This screen is used to approve, return or disapprove a Travel Advance. It can also be used to add an additional approver. To add an approver click **Add Approver** and **Look Up** approver's last name. Click **Ok** to add approver.

## Step 8

Click **Unlock** to modify reason.

The **Review Items** screen displays any exceptions to department policies. Click the **Summary** tab.

## Step 9

The **Summary** screen displays information from tab 1. Check Delivery Options and tab 2. Travel Advance. Click **Approve / Return** tab.

## Step 11

At the **Approve/Return** screen, key your password and click one of the following:



Approves advance and moves the form to the next approver or accounting.



Returns the form to the employee or previous approver for corrections or additional information. You must key a return reason. CalATERS sends an e-mail notifying the person that the form has been returned.



Disapproves and returns the form to the employee. CalATERS sends an e-mail notifying the employee of the disapproval. The employee cannot modify the form. The form becomes a permanent record.

## Step 12

When an adjustment is made on tab **2.Travel Advance**, the **Adjust Reason** box will display. Click the down arrow to display options, then select an option. If **Other** is selected, key a reason e.g., See Note Log.

CalATERS will generate an e-mail to the employee, notifying them of the adjustment.